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ABSTRACT

An analysis and review of the activities in the Southwest Educational Development Laboratory Regional Exchange (SEDL/RX) is presented, and the following questions spoken to: 1) How has the SEDL/RX evolved and developed? 2) What are the major activities at the SEDL/RX? 3) How do the Advisory Board members perceive the SEDL/RX and what do they see in the future? and 4) What can be learned from the SEDL/RX's past that can positively influence its future? Appended is a log of key SEDL/RX events. (JD)

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FORMATIVE EVALUATION FOR THE FIRST THIRTEEN MONTHS OF THE SEDL/RX

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November 1977

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Research and Development Center for Teacher Education
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November 14, 1977

As a part of the involvement of the Research and Development Center for Teacher Education in the SEDL/RX, the CBAM staff have conducted an analysis and review of the activities of the SEDL/RX in its first thirteen months of operation. This analysis has been carried out in the fullest spirit of process or formative evaluation. The objective of the evaluation is to summarize the activities of the first thirteen months, point out successes and problems, and make process recommendations to be considered by the RX Advisory Board and the SEDL/RX staff as they move into the next phase of RX development.

In this report we explore the accomplishments, activities and some of the perceptions of the RX at this time. We were particularly interested in developing a summary of what has been done to date so that it will be on the record. The RX is also at the point where decisions need to be made about the role, if any, of evaluation activities in the future. Further, it would seem that there must be some lessons that could be learned from taking a moment to reflect back on the intense activities of this past year.

It is in this spirit of offering a catalyst for discussion and reflection as we plan next steps that this report is offered. Specifically, we have attempted to respond to the following questions:

1) How has the SEDL/RX evolved and developed?
2) What have been the major activities at the SEDL/RX?
3) How have the Advisory Board members perceived the SEDL/RX and what do they see in the future?
4) What can be learned from the SEDL/RX's past that can positively influence its future?

Methodology

Due to the formative nature of this report, it was felt that all types of data could be considered in order to provide the richest picture possible. Thus, varied sources of data were accessed, including: correspondence, transaction logs, activity logs, field notes of meetings, and interviews with staff and Advisory Board members. These data are analyzed and described in the following sections. The report concludes with a description of several conclusions, questions and recommendations.

The Evolution of the SEDL/RX

Trends in the Development of the SEDL/RX

The SEDL/RX has evolved in little more than a year from five fully independent states, connected only geographically, with a U.S.O.E. Regional Office and an eductional laboratory to a viable, information-sharing, service-oriented network with enormous potential for growth. The development of this RX provides an interesting case study, since unlike other RX's in the country, this one started from "scratch" to develop not only information resources and training capability, but also to develop a sense of interstate collegiality and regionality. Much can be learned from this evolution.

Developing Concerns. Ongoing research at the Texas R&D Center for Teacher Education indicates that as persons become involved with something new, or a change, they experience "concerns" that can be described in predictable ways. These concerns tend to develop from initial "personal" concerns to concerns about the "task" at hand and, finally, to concerns about "impact" on the clients to be affected by the change. This sequence of concerns can provide a useful frame of reference to contrast the development of the SEDL/RX from the perspective of both the staff and the members of the Exchange.

In the course of the thirteen months of the RX, SEDL/RX staff members have exhibited appropriate and desirable changes in their concerns as the RX has developed. These concerns have been reflected in the questions they have asked and the problems encountered. Although always concerned about meeting the needs of the states, early-on personal and task concerns were a part of the staff's environment. Initially the questions being asked included: What is my role? Will I ever learn all I need to know? What is the R&D Exchange, and how do I fit into it? What promises can we make that we can be certain we can keep? Later, concerns about the task of setting up and managing the RX predominated: How can we make the best use of our allotted linker training time? How many people can we financially service? Will the information service activity be accomplished and/or contracted (i.e., Will I ever find the time to finish those searches?)? How can state and NIE needs, which often conflict, all be met? Gradually, as these self and task concerns became less intense, questions that were primarily client- (i.e., state) oriented became more intense: How can we meet the immediate individual needs of states as well as develop the regionality that has the potential of meeting even more needs in the future? How can we be certain we know exactly what information people are seeking so we can be more certain of locating it? How can RX activities be interfaced with other regional SEDL thrusts so as to have greater collective impact?

As RX staff members' concerns have changed, so too have the concerns of the members of the Exchange, the five states and OE regional office. Questions and concerns expressed at early Advisory Board meetings included: How is this "one more NIE effort" going to affect my state? What services can the Exchange provide my state? How much of my time and the time of my colleagues within my state will be taken by this effort? As the roles of both member states and SEDL became clearer and early concerns were resolved, questions being asked at meetings focused more on organizing and managing of the actual activities of the Exchange: How many people can I send to the workshop? When can we start sending search requests? How can RX staff visits to states be arranged? In the last month, member concerns have changed to a focus on impact of the Exchange on a broader portion of users of R&D products within RX states: How can workshops be

individualized such that more needs within each state can be met? How can the RX help us take advantage of other federally-sponsored projects, activities, and events that will meet some of our other needs? How can we make more people in our states aware of and get more out of RX activities?

Developing Ownership. Initially, the only owner of the RX was the grantee, SEDL. One very important goal was to gain ownership by each of the states and the OE office, most of whom were likely to be suspect of a loosely-structured, unspecified federal project with money allotted directly to a federally-established institution. One way SEDL sought to establish regional ownership was by being highly responsive to state needs, by catering as much as possible to the requests and preferences of the states organizationally and substantively. Thus, a "reactive" rather than a "proactive" mode was operationalized, sometimes to the disapproval of the funding agency. It is worth noting that this "clients first" perspective has not been as strongly emphasized in other Regional Exchanges. The result has been an RX that most Exchange members consider to be responsive to their needs.

Developing Participation. Particularly during the planning period, but also well into the operational phase, one person from each state, one from the OE office, and SEDL/RX staff members "were" the Regional Exchange. Since then, however, through participation in RX-sponsored workshops and accessing the information resources provided by the RX, many more individuals from all states have become involved in Exchange activities. Broadening the participant base has not only resulted in more people being aware of the RX and realizing its usefulness, but also has provided a broader constituency base to insure its continuation. A further effect is that the individuals have formed their own informal networks and are establishing new lines of communication, both within and without the RX. Linking people has become an important outcome and is one characteristic of an ideally functioning Regional Exchange.

Developing Resource Base. Initially, RX staff were linked to a relatively undefined R&D Exchange network with few other linkages. As the RX has developed, it has built linkages to many potentially useful resources, both within and outside of the RX region. Ongoing contact is maintained with the Texas CITE Project, the Linkage Training Service, the national RDX contractors, and with the numerous ERIC Clearinghouses. Knowing who-to-call-when is a vital capability for any service-oriented organization, and such a capability is rapidly developing within the SEDL/RX. More specific information about outside contacts is given later in this report.

SEDL/RX in Relation to Other Projects

In addition to developing and strengthening ties with each of the five states of the SEDL/RX, the project is in the process of clarifying its role and "complimentarity" with the developing regional emphasis of SEDL as a regional educational laboratory. As the lab expands and clarifies its larger roles within the region, the RX offers a potentially exciting arm for communication and dissemination of R&D outcomes, products, and services from SEDL and elsewhere.

The SEDL/RX is also tied to the other Regional Exchanges and the national contractors. As each of these projects further clarifies and develops its own capabilities, there should be increased opportunity for cross RX sharing. Further, it is hoped that the national contractors will play a more visible role, since to date it appears that the SEDL/RX is servicing these contractors significantly more than they are servicing this Exchange.

Major Activities of the SEDL/RX

Key Events and Activities

Appendix A contains a calendar indicating the key events and activities of the SEDL/RX from the funding of the planning period (October 1, 1976) through the middle of November 1977. Basically eight kinds of activities ensued:

1) Advisory Board meetings (4 full-day meetings and one part-day meeting)
2) Participation in national R&D Exchange activities (5 meetings ranging from 2 to 4 days)
3) Baseline data collection involving on-site visits to all states and the OE regional office
4) Linker training need-sensing visits to 4 states
5) Dissemination linker training workshops involving all states and the regional office
6) Information service visits to three states
7) The National Dissemination Forum occurring the week of June 20, 1977
8) And most recently, servicing information requests from the SEDL/RX states.

Detailed information about these activities can be found in the SEDL/RX quarterly reports.

Analysis of Trends in Activity and Contacts

Major ingredients in the SEDL/RX are the contacts and other networking activities participated in by the SEDL based staff. The R&D Exchange has established procedures for documenting activities and contacts in the form of (1) transaction logs for explicating major contacts and (2) interaction logs for keeping track of every contact made by RX staff. For purposes of this evaluation an effort was made to compile and categorize the activities and contacts reported on both these forms and documented in the outgoing correspondence of the SEDL/RX. This information provides a picture of the nature of these contacts and with whom they have been made.

Figure 1 displays contacts made by and with the RX by means of phone, meetings, and workshops and letter and other mailouts. Several trends are indicated by this chart:

1) The RX has participated in a wide variety of activities and, within each activity, contacts have been made with a wide variety of institutions and individuals.
2) The amount of activity has increased considerably from May 1977 when these logs were first kept.
3) The variety of contacts has also increased as new sources for information and resources are discovered and as the SEDL/RS has become a resource for others to draw upon.
4) The phone has been the primary source of contact. This is particularly important since it allows for immediate and interactive communication of and response to needs as well as contributing to the interpersonal contacts and rapport-building vital to the RX effort.

Figure 1: Contacts Made By and With the RX

SEDL/RX Activities	Phone						Meeting & Workshop						Letter & Mailing					
	May	June	July	Aug	Sept	Oct	May	June	July	Aug	Sept	Oct	May	June	July	Aug	Sept	Oct
SEDL/RX Request for Information																		
RDX			3	2	1	1						1						
Tx			1															
Okla			1			2												
Ark			1															
NM																		
La																		
SEDL									4									
CITE									6	2								
CEDaR			1									1						
ERIC			2			8										1		
RISE			2															
Stanford			1															
Private Corp.			1		1										1			
Gov't. Agencies				2														
CEPM				4						1						1		
Inst. for Devt. of Ed. Act.				1														
MAILS				2		1												
NTL				1														
Tx RRC				2														
AEL/RX					1													
NWRL/RX					1	2												1
NIE					1													
Misc.						3												1
Request for Information, Searches of SEDL/RX																		
Okla	1	1		3	1											1		
OE						2									1			
TEA				1	2				1									
Greg Benson			1															
AEL				1		1												
Texas A&I University																	1	
North Carolina					1													
Linker Training Need Sensing																		
LTS	2		2				2	2										
Tx	2							1										

SEDL/RX Activities	Phone						Meeting & Workshop						Letter & Mailing					
	May	June	July	Aug	Sept	Oct	May	June	July	Aug	Sept	Oct	May	June	July	Aug	Sept	Oct
Okla	2							1										
Ark	1								1						1			
La	1		1															
NM	1		1						2						1			
Linker Training Workshops																		
Advisory Bd.									1						1			
UTR&D			2															
RDX			2															
LTS			2			3					1	1				2		1
Tx				1						3	1	1				1		1
Okla				2							1	1				1		1
NM				1		3					1	1				1		1
Ark				1							1	1				1		1
OE				1							2	1				1		1
La						1					1	1						1
Texas Workshop																		
LTS			5	3														
TEA			6	2												1		
Tx Service Center				1														
Okla				2														
Dr. M. Taylor				1														
Information Resources Need-Sensing																		
NM			1								1							
Ark			1	2						1								
Okla			2	1							1							
Sharing of Information																		
Advisory Board													1		1		2	
NM															1			1
AEL			1	2											1			
R&D Community (Newsletter)																		1
NWRL/RX					1													
La						3											1	
OE																	1	
Okla																	2	
Ark																	1	

SEDL/RX Activities	Phone						Meeting & Workshop						Letter & Mailing					
	May	June	July	Aug	Sept	Oct	May	June	July	Aug	Sept	Oct	May	June	July	Aug	Sept	Oct
Communication with RDX Systems Contractors for System Business																		
FWL				3												2		
LTS				2						1						1		
Communication with NIE			3	1														
Internal Communications																		
Planning, Proposal Writing									6	21		4			1			
Evaluation									1			1						
with UfR&D	1			2		1	2	1	3	1		3			1			

5) There are gaps in the information recorded that are obvious to individuals who have participated in a major part of the RX activities. For example, the five Advisory Board meetings were not recorded consistently on activity logs, yet are a vital aspect of the RX. It would be impossible to trace these occurrences, attendees, etc., by referring to the logs, although using activity logs for such documentation could provide an easily accessible source of this kind of information. More consistent and compulsive use of the activity log adapted by SEDL/RX staff from RDX interaction logs is recommended.
6) Nowhere in the SEDL/RX files can be found detailed descriptions of the content of phone calls, which obviously are the most important tool used for contacts. Copies of letters are kept, but only short statements are made about phone calls on activity logs, which is insufficient to understand the content of a 30-minute interaction. It is recommended that each phone call be recorded systematically and consistently. Appendix B illustrates a phone call record format that might be used or adapted to meet this need. Keeping these forms handy, perhaps on a clip-board under the phone, would effectively meet this need.

Analysis of the Frequency of Outgoing Correspondence

A separate analysis was made of outgoing correspondence. Project record keeping procedures include placing copies of outgoing correspondence in a notebook in chronological order. Figures 2 and 3 are summaries of the outgoing mail. Figure 2 provides a breakdown of outgoing mail by target and frequency per month. In Figure 3, the frequency of correspondence by different project staff are summarized. The following interpretations of these data are offered for Figure 2:

1) There has been regular and frequent (every 2 to 3 weeks) written contact with the Advisory Board as a group.
2) Each of the members of the Advisory Board have additional individual written contact, with Cutter, Carpenter and Louisiana having the most.
3) In the last three months, correspondence with state staff, other than Advisory Board members, has increased significantly. This is further indication of the broadening of the membership of the network.
4) Lab/center contacts appear to increase and decrease with proposal writing times.
5) There is monthly written communication to NIE.
6) Staff requests for information sources began in March, peaked in May, indicating long lead time in anticipation of information requests.
7) The return of information in response to requested searches began in October.

Interpretations based on Figure 3 include:

1) The total rate of correspondence per month is surprisingly

Figure 2. Frequency of Outgoing Correspondence by Destination

	1976								1977											Total
	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	
Advisory Board (as a group)*				1	2		2	3	3	4	6	1		2	1	3		4		32
Craddock				1		1	1		1				1				2	2		9
Haswell						1			1								1			3
Cutter				2		2							1	1			1	1		8
R-Esparza						1								1	1		1			4
Carpenter				1		1							1		1		1	1		6
La.--Bullock, Gaston, Cantwell				1		1				1				1	1		2			7
Other RX State Contacts																				
Ark	1														2		2	2		7
La	1						3										1			5
NM		1		1									1				8	1		12
Okla							2						1				7	3		13
Tx	1					2	4			1				1	1					10
Labs & Centers					1	9		1	2	1	1	3	6	2	2	2	8	3		41
NIE								2	1	2	1	4		3		1	1	1		16
Requests for Information											2	9	21	2	4	2		8		48
Search Material																		8		8

Planning Period

Proposal Submitted

*Each correspondence with the Advisory Board also includes "carbon copies" to several staff at SEDL, UTR&D, and NIE that are not included in the tallies in this figure.

Figure 3. Frequency of Outgoing Mail by Staff Person

	1976								1977										
	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov
Perry	3	5																	
Kronkosky		3	1	17	9	30	15	27	24	34	46	18	5	8	6	1	4	24	
Adams							7		1		7	7	26	14	10	4	26	23	
Schechter													8	5	5	9	5	11	
Total	3	8	1	17	9	30	22	27	25	34	53	25	39	27	21	14	35	58	

Proposal Submitted

Planning Period

consistent. There is not a regular increase with the addition of staff or operationalization of the project.
2) Outgoing correspondence increases at proposal writing time.
3) As Sharon and Jan joined the project and have taken hold, they are sending more correspondence, while Preston's "share" has decreased.

Analysis of the Content of Correspondence

The analysis of the content clearly indicates that the staff use correspondence to confirm decisions and actions taken through phone calls, meetings, visits, and workshops. Clearly, any closer analysis of the resource costs relative to project activities will require much better documentation of phone calls and meetings.

This result is not surprising. Past documentation at the Texas R&D Center has demonstrated that active projects and the most active field sites will use the telephone primarily with much less exchange of correspondence. Documentation is more of a problem, however, since active field staff do not easily find time to document their interactions.

Although the frequency of correspondence has remained about the same, the content has shifted from Drs. Perry and Kronkosky in early policy level and project development correspondence to the more recent information services correspondence of Sharon Adams and the workshop correspondence of Jan Schechter.

Reactions of RX Participants

Advisory Board members were asked to reflect on how they perceived the RX to have developed over time. Four areas of questions were asked of each of the six Advisory Board members through interviews conducted in the last week of October. These questions were: (1) How do you see the RX has developed over time? (2) What were the strengths and weaknesses of the project in the last six months? (3) What would you like to see for activities in the next six months? (4) What are your long-term (3-5 year) visions for the SEDL/RX?

The Development of the Exchange

In the responses to the first question, two trends were identified:

1) At first, SEA representatives were skeptical about the RX, wondering whether it would be duplicating current efforts or whether their participation would be simply a way of keeping people in business, i.e., funded, rather than having the potential to truly meet some needs. Over time they have come to have confidence in and respect for SEDL, as indicated by their willingness to continue participation and to involve others from their states. They feel the potential is there for a real regional role with greater capability than can be found in any single state.
2) There has also been a noticeable development in SEDL/RX staff, from lacking confidence in their abilities to both conceptualize

the role of the RX and to significantly contribute to meeting the dissemination needs of the states. Gradually, this confidence has increased as has the capability to meet state needs and broker services and information.

Strengths of the Exchange

Responses as to what were seen as the strengths of the RX were:

1) Willingness of SEDL/RX staff to be flexible in changing when asked, to listen, and to be responsive both to the desires and needs of each state. This includes the early establishment of parameters, such as that the RX would deal directly with SEA's only, in addition to acknowledging the individual problems and concerns with respect to each state's dissemination capabilities.
2) Increasing the states' access to materials, such as the compilations of CBE and reading resources, and providing information about national events, such as the White House library conference and the 1980 census, which might have gone unnoted otherwise.
3) Giving the states the opportunity to focus in on their own dissemination needs, develop a model and implement it with guidance.
4) Providing impetus and funding to attend the Dissemination Forum in June and the workshop sessions to broaden the knowledge base of all participants.
5) Affording the opportunity for states to be connected with others and with other organizations who can be brought in to provide specific services, training, and resources. Establishment of a network.
6) They are "delighted" with the searches that have been done by RX staff.
7) Provides a back-up for such state projects as information services and dissemination grants.
8) The NIE catalog index has been very useful.

Weaknesses of the Exchange

When asked to describe some of the weaknesses of the Exchange, one member could not think of any. Other members gave a variety of responses:

1) The problem of working within a region is that no two states will have the same needs. The membership on a board such as that of the RX may change, and so trying to keep continuity and progress is difficult. This is an inherent problem, though, rather than a weakness in this particular effort.
2) One problem two persons mentioned was that the participants themselves were guilty of letting the SEDL/RX staff essentially do everything: set everything up, generate most of the ideas, etc. They felt they themselves should be more proactive rather than reactive, should be more creative and assertive. One noted, on the other hand, that states have not been asked to

contribute in this way, and so they have not.

3) One person noted that the Exchange has not yet generated a sufficient action program. Not enough conceptualizing has been done as a group to generate ideas that could be acted upon.
4) Another mentioned that the RX has not "piggy-backed" enough on existing dissemination efforts such as NDN and so has maintained a rather narrow focus.
5) There has not been enough concentration on content within the RX. This weakness was reflected on by another individual who suggested there was not enough substantive input from the Advisory Board. For example, they should have been consulted about workshop content, format, and consultants.
6) The lack of "flow-through" money is seen by one individual as a weakness (i.e., money that is passed directly on to the state to use as they see fit). Thus, states lack any real control of the RX.
7) One individual noted that there is much restriction imposed by NIE. For example, the RX does not have the freedom to provide training by persons outside of NIE contracts. They should instead be able to broker any services that a specific state needs.
8) Two people suggested that the last linkers training workshop fell short of the expectations of the participants, that it did not address their needs as directly as desirable.
9) Two states indicated that if they themselves could "get their act together" more, they would be more able to take advantage of what the RX has to offer. This is not a criticism of the Exchange but a realization that they themselves are not making the best use of it.

Recommendations for Change

Respondents were asked to recommend changes in how the Exchange is functioning:

1) Several respondents suggested that there be more opportunities for sharing across the states. This could be done by each state sharing product listings, descriptions, brochures, etc., that represent promising practices within the state and resources that can be accessed by others. This could also be done through a regional Dissemination Forum, still in the planning, which will allow all professional disseminators of each state to convene and share ideas and concerns, as well as develop more communication and linkages.
2) An effort should be made to integrate SEDL/RX activities and goals with other regional SEDL efforts.
3) The Exchange should establish more contact with information resources like ERIC. The proposed contracting with the Texas CITE Project is a positive step in this direction.
4) In instituting the feedforward function, the R&D Exchange, as a whole, should recognize that research and development is performed at both SEA and LEA levels as well as in outside R&D institutions.

Some funds should be funneled directly to states and then to LEA's to do "action research." In addition, feedforward interviews should not only assess what use is being made of R&D products but also what research and development is actually being done.

5) There is some inconsistency among states as to what would be the best "next step" in terms of training. Some make a case for workshops specific to each state's need being conducted in that state so more people can participate. One mentioned wanting all people within the state in day to day contact with teachers to be involved. Another suggested the need to take the state's dissemination plan developed at previous workshops and operationalize it. On the other hand, another state indicated the need for contact with others for sharing and linking new ideas and processes rather than extensive training specific to the state. A compromise suggestion was for individualized training followed by a regional conference or workshop where states could share their progress and insights.
6) Another suggestion was to adopt the concept of the regional seminar where a carefully selected delegation from each SEA would visit other states to receive one-to-one information about what is being done in dissemination.
7) Having an inward WATS line to the SEDL/RX would facilitate and encourage communication and requests and increase the accessibility of services to an expanded number of individuals.

Visions for the Future

Members of the Advisory Board were asked to reflect on their vision for the future role of the Exchange. Responses included:

1) Making the RX fully operational including continual need-sensing and offering of services.
2) Additional growth in back-up to state information services, particularly in compiling both lists of R&D materials, and a resource center with sample R&D materials.
3) An ongoing and continually updated "promising practices" exchange for the five states.
4) Assume a linking role in making it possible for some states to contract to share resources that have already been developed in other states.
5) The Exchange could link SEDL research capabilities with the states so as to increase their own capabilities in this area.
6) One individual envisioned that partially as a result of RX input, five years from now each state would have recognized individuals in the roles of facilitators and linkers who would be knowledgeable of how research and development could be disseminated and implemented. The emphasis of these individuals would be on improvement of services to children. This could be the result of a regional network with the RX as a nucleus bringing the operating components together to form a cohesive whole.

Conclusions, Questions and Recommendations

Based on our observations over the last year and a half, participation in most events, analyses of the existing notes and records, and interviews with the SEDL/RX Advisory Board, the following conclusions, questions, and recommendations are offered. As we expressed at the beginning of this report, this is designed and intended as a formative study, and the following discussion is intended to stimulate further discussion and processing as the SEDL/RX moves into a new operational phase.

Conclusions

1) Through the combined efforts of key staff from one regional lab and five states with funding from NIE, an R&D Exchange has been established. The SEDL/RX has made an impressive start and has solid enough footing so that all of the states have stayed with the project and are looking toward its future.

2) The early concerns of the staff and the states have been reduced and concerns about impact have greatly increased as a result of the successful beginning steps.

3) The states are dramatically diverse in their needs, dissemination sophistication, and politics. Due to the client-centered orientation of the project staff, each state, at least in part, has been able to gain from the project.

4) Due to the confidence of the Advisory Board members in themselves and their SEA colleagues, they have encouraged the involvement of other SEA staffs in the RX which is greatly increasing the RX's potential.

Questions

We do have some questions of the RX staff and the Advisory Board that they might wish to consider. We know some of these are talked about, but definite answers are needed quickly.

1) What, if any, evaluation activities should be incorporated into the project? At present, it would seem that formative evaluation data would be most helpful in designing and conducting future activities. However, at some point, summative evaluation questions will need to be addressed.

2) What are the near future and 3-5 year goals and objectives for the SEDL/RX? From interviewing project staff and Advisory Board members, it does not appear that the future goals are too clearly formulated or that there is a common understanding of these.

3) What is the relationship of the SEDL regional emphasis to the SEDL/RX? It appears that there could be a great deal of stumbling over each other if these activities and staff roles are not carefully thought out and coordinated.

Recommendations

Since we are among colleagues and are participants in the SEDL/RX, we would like to make several recommendations that we see as needing attention:

1. The role of the Advisory Board needs to shift to being more of a conceptual and planning body.

Until now it has been crucial to success that the SEDL staff take major responsibility for defining tasks and setting directions. Now, the Advisory Board should begin to shoulder some of this responsibility. The states are very different, attending to each one and every one is going to be a difficult and, at times, an impossible goal. Rather than the SEDL staff having to shoulder this responsibility by themselves, it should be shared.

2. Documentation of project activities, especially phone calls and meetings, needs to be done.

If there is to be any future formative/process evaluations, then more systematic data are required. Given the present documentation activities, it is not possible to fully understand or describe the allocation of resources or project activities. Future studies would be no more meaningful than this one and certainly will not provide the basis for addressing summative/product/outcome questions.

Incidentally, assuming that other RX projects have the same level of rigor in their documentation activities, serious questions can be raised about the reliability and validity of findings reported out of the data being collected at the Far West Lab.

3. The SEDL/RX needs to become much more explicit and imaginative in outlining its long range goals.

Up until now the project staff and the Advisory Board have had their energies consumed in making the system operational. During this year, they need to take the time to brainstorm alternative futures and develop consensus on their intermediate and long term goals. Without better goal clarity, the lab staff cannot effectively allocate limited resources, and without goal clarity, all of the states with their many different needs and characteristics will not be satisfied with the outcomes of the RX activities selected.

Much has been accomplished in a very short time with limited resources. It takes competent and committed professionals to establish a seven-agency interstate cooperative in a year and a half. All are to be congratulated on the amazingly successful start. The challenge is now to address, anticipate, and manage the future directions of the project, not to become a victim of it.

Appendix A

September - December 1976

KEY EVENTS -- SEDL/RX

SEPTEMBER 1976

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

OCTOBER 1976

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			Planning Period		1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18 ← RDX Meeting →	19	20	21	22	23
24/31	25	26	27	28	29	30

NOVEMBER 1976

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1	2	3	4	5	6
7	8 Baseline Data Collection Interviews	9	10	11	12	13
14	15	16	17	18	19	20
21 ← RDX Meeting →	22	23	24	25	26	27
28	29	30				

DECEMBER 1976

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

January - April 1977

JANUARY 1977

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
						1
2	3	4	5 Advisory Bd. Meeting	6	7	8
9	10	11 ← RDX Meeting	12	13	14 →	15
16	17	18	19	20	21	22
23 30	24 31	25	26	27	28	29

FEBRUARY 1977

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1	2 Advisory Bd. Meeting	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	End of Planning Period				

MARCH 1977

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

APRIL 1977

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20 Advisory Bd. Meeting	21	22	23
24	25	26	27	28	29	30

May - August 1977

MAY 1977

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1	2	3	4	5	6	7
8	9	10	11	12 ← RDX Meeting →	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

JUNE 1977

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2 Linker Training Need-Sensing: Oklahoma	3	4
5	6 Linker Training Need-Sensing: Texas	7	8	9	10	11
12	13	14	15	16	17	18
19	20 ← RDX Meeting →	21	22	23	24	25
26	27	28	29	30		

Dissemination Forum

JULY 1977

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1 Linker Training Need-Sensing: Arkansas	2
3	4	5	6	7	8	9
10	11	12 Linker Training Need-Sensing: New Mexico	13	14	15	16
17	18	19	20	21	22	23
24/31	25	26	27 Advisory Bd. Meeting	28	29	30

AUGUST 1977

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Information Service Visit: Arkansas

September - December 1977

SEPTEMBER 1977

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				Information Service Visit: New Mexico	2	3
4	5 Information Service Visit: Oklahoma	6	7	8 Linker Training Workshop: Texas	9	10
11	12	13 Advisory Bd. Mtg.	14	15	16	17
18	19 ← Models of Dissemination Workshop: Okla., Ark., La., N. M., OE →	20	21	22	23	24
25	26	27	28	29	30	

OCTOBER 1977

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17 ← Roles of Linkers Workshop: Ark., La., Okla., N. M., OE →	18	19	20	21	22
23/30	24/31	25	26	27	28	29

NOVEMBER 1977

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16 Advisory Bd. Meeting	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

DECEMBER 1977

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Appendix B

PHONE CALL RECORD

DATE_____ YOUR NAME_____

NAME OF PERSON_____

SITE_____

☐ I MADE CALL
☐ I RECEIVED CALL
☐ I RETURNED HER/HIS CALL
☐ S/HE RETURNED MY CALL

PURPOSE: 1._____ 4._____

2._____ 5._____

3._____ 6._____

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GENERAL TONE OF CONVERSATION_____